

Message Text

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SUBJECT: COUNTRY COMMERCIAL CAMPAIGN REVIEW

SUMMARY: ALTHOUGH FAIR NUMBER OF CCP GOALS ARE BEING ACHIEVED,
THERE ARE NOTABLE EXCEPTIONS AT A TIME WHEN YUGOSLAV ECONOMIC/
COMMERCIAL CLIMATE IS OFFERING INCREASED OPPORTUNITIES TO U.S.
FIRMS. THIS LARGELY TRACEABLE TO PERSONNEL GAPS AND SHORTAGES
IN ECONOMIC/COMMERCIAL SECTION. END SUMMARY.

1. ECONOMIC/COMMERCIAL CLIMATE: SINCE THE BEGINNING OF THE
FISCAL YEAR, YUGOSLAV ECONOMIC SITUATION AND BALANCE OF PAYMENTS
HAVE IMPROVED. THE YUGOSLAV DEVELOPMENT PLAN HAS BEEN COMPLETED
AND SOCIAL ACCORDS, TOGETHER WITH INDIVIDUAL PROJECT PRIORITIES,
ARE BEING NEGOTIATED IN SEVERAL KEY SECTORS. THESE DEVELOPMENTS
OPEN NEW BUSINESS OPPORTUNITIES FOR U.S. FIRMS. ON THE OTHER
HAND, YUGOSLAV IMPORT RESTRAINTS, OFTEN UNPUBLISHED, REMAIN
SEVERE AND FOREIGN TRADERS ARE BEING AFFECTED BY A SERIES OF
NEWLY ENACTED OR PROPOSED LAWS AND REGULATIONS WHICH HAVE
COMPLICATED THE BUSINESS ENVIRONMENT AND GENERATED AN INCREASE
IN REQUESTS FOR INFORMATION TO THE EMBASSY, THE ONLY INDEPENDENT
SOURCE OF INFORMATION AVAILABLE IN YUGOSLAVIA TO U.S. INDUSTRY.
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2. MAJOR ACTIVITIES: DURING THE PERIOD, MAJOR ACTIVITIES
INCLUDED SUCCESSFUL EVENTS TO PROMOTE U.S. ENERGY SYSTEMS AND
AVIONICS AND GROUND SUPPORT EQUIPMENT. USDOC AND THE EMBASSY
INITIATED A MAJOR CAMPAIGN, INCLUDING PREPARATION FOR A TECHNICAL
SALES SEMINAR AND PROCUREMENT OF U.S. FIRMS FOR AN EXHIBIT TO
PROMOTE FOOD PROCESSING/PACKAGING AND AGRICULTURAL EQUIPMENT.
BILATERAL DISCUSSIONS IN BELGRADE AND EXTENSIVE FOLLOW-UP
IN EXPORT CONTROL HAVE RESULTED IN IMPROVED PROCEDURES ALTHOUGH
WE STILL AWAIT RESULTS OF YUGOSLAV INVESTIGATION OF SIX ALLEGED
DIVERSIONS. MARITIME ISSUES HAVE BEEN UNDER DISCUSSION WITH THE

YUGOSLAVS AND WE HAVE NOW RECEIVED WRITTEN ASSURANCES (SEPTTEL FOLLOWS) THAT THE YUGOSLAVS DO NOT ENGAGE IN DISCRIMINATORY PRACTICES. SECRETARY RICHARDSON'S VISIT IN NOVEMBER PROVIDED FRUITFUL REVIEW OF BILATERAL ISSUES AND CONTRIBUTED TO YUGOSLAV UNDERSTANDING OF THE DISCOURAGING EFFECT OF THEIR JUNE 1976 REGULATION ON FOREIGN INVESTMENT; ALTHOUGH THE PROPOSED INVESTMENT LAW IS STILL IN DRAFT (ITS THIRD) AND HAS NOT BEEN REVEALED, EARLY INFORMATION INDICATES THAT IT WILL PROVIDE SOME IMPROVEMENT IN PRESENT INVESTMENT CONDITIONS. EMBASSY ACTIVITIES ON THESE TRADE EVENTS AND TRADE POLICY ISSUES HAVE AMOUNTED TO A FULL SCHEDULE FROM WHICH WE HAVE HAD TO DELETE SOME OF OUR TRADE PROMOTION ACTIVITIES, PARTICULARLY IN THE MAJOR PROJECTS AREA.

3. PERSONNEL RESOURCES: THROUGHOUT THE FISCAL YEAR THE EMBASSY HAS BEEN OPERATING WITH ONE LESS FSO COMMERCIAL POSITION THAN DURING THE PREVIOUS YEAR. WE HAVE LOST AN ADDITIONAL 70 FSO WORKDAYS THROUGH UNANTICIPATED GAPS IN THE SECTION.

4. OUTLOOK: WITH THE GAP IN PERSONNEL ACCENTUATING THE WORKLOAD, THE EMBASSY WILL HAVE TO CONCENTRATE ON ONLY THE MOST ESSENTIAL ACTIVITIES THROUGH JUNE. HIGHLIGHTS WILL BE DEVELOPMENT OF MARKET INFORMATION ON THE CHEMICAL INDUSTRY BY MARCH 16; VISIT OF AN EXIMBANK TEAM FOR TWO WEEKS IN THE SECOND HALF OF MARCH; LIAISON BETWEEN US/YEC AND ITS YUGOSLAV COUNTERPART, ALSO IN MARCH, IN PREPARATION FOR THE JOINT MEETING OF THE TWO ORGANIZATIONS. LIMITED OFFICIAL USE

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TIONS IN YUGOSLAVIA IN JUNE; PROCUREMENT EFFORT BY CONGEN ZAGREB FOR EXHIBITORS FOR ZAGREB SEPTEMBER 1977 FALL FAIR; AND INTENSIVE ACTIVITY ON FOOD PROCESSING AND PACKAGING CAMPAIGN, INCLUDING PROMOTION OF NOVI SAD EXHIBIT AND TECHNICAL SEMINAR IN APRIL. THESE ACTIVITIES WILL OCCUPY THE TWO COMMERCIAL OFFICERS FULL TIME AND REQUIRE SUPPORT BY ECONOMIC OFFICERS, LEAVING US TO OBTAIN INFORMATION AND REPORT ON NEW BANKING, INVESTMENT, FOREIGN REPRESENTATION LAWS, SOCIAL ACCORDS AND DEVELOPMENT PLANS AS WE CAN. THE MAJOR PROJECTS CAMPAIGN WILL CONTINUE TO SUFFER AND WE WILL REMAIN UNABLE TO SUPPORT ANY TRADE PROMOTION EVENT OUTSIDE YUGOSLAVIA EXCEPT THE PARIS AIR SHOW.

5. WE PROVIDE THE FOLLOWING COMPREHENSIVE ACCOUNT OF CHANGES WHICH HAVE OCCURRED IN CAMPAIGN AND OTHER ACTIVITIES THROUGH FEB. 20.

6. CAMPAIGN NO. 1 - ENERGY SYSTEMS

A. RESULTS: ACTION 1 COMPLETED. ACTIONS 3, 5, 6 AND 8 PARTIALLY ACCOMPLISHED. ACTIONS 2, 4, 7 AND 9 NOT ACCOMPLISHED. ACTIONS 10 AND 11, CALLING FOR PROMOTION OF ENERGY SYSTEMS AT 1977 ZAGREB FALL FAIR, DELETED.

B. COMMENTS: THE NOVEMBER TECHNICAL SALES SEMINAR PROVED AN OUTSTANDING SUCCESS. THE 6 MAJOR U.S. PARTICIPATING FIRMS LISTED THEIR OBJECTIVES AS CONTACT DEVELOPMENT. THE EMBASSY'S OBJECTIVE

WAS EVEN MORE BASIC: SINCE U.S. FIRMS HAVE NOT OBTAINED A MAJOR ENERGY CONTRACT IN THIS COUNTRY, EXCEPT FOR THE KRSKO NUCLEAR PLANT, SINCE 1960, WE WISHED TO BRING U.S. FIRMS TOGETHER WITH KEY YUGOSLAV DECISION-MAKERS WHO COULD HELP THE U.S. REPRESENTATIVES DETERMINE WHETHER THEY COULD OPERATE COMPETITIVELY IN YUGOSLAVIA IN THE FACE OF COUNTERTRADE, LOCAL CONTENT REQUIREMENTS AND VARIOUS UNPUBLICIZED IMPORT RESTRAINTS. IN THE THREE-DAY SERIES OF INTENSIVE DISCUSSIONS, WHICH LASTED AS LATE AS 10:00 P.M. FOR SOME OF THE U.S. FIRMS, THEY GAINED A NEW PERSPECTIVE OF THE MARKET AND CONCLUDED THAT THEY COULD COMPETE. MOST OF OUR OWN ATTENTION SINCE THE SEMINAR HAS BEEN FOCUSED ON THE KRSKO PROJECT, AS REPORTED SEPARATELY, BUT LIMITED OFFICIAL USE
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AT LEAST 4 OF THE U.S. FIRMS HAVE INDEPENDENTLY BEEN FOLLOWING UP ON OPPORTUNITIES DEVELOPED DURING THE SEMINAR. UNFORTUNATELY, HIGH PRICES ELIMINATED U.S. TURBO-GENERATOR MANUFACTURERS FROM A LARGE THERMO-ELECTRIC PROJECT AND U.S. BOILER MANUFACTURERS WERE EXCLUDED BECAUSE LIMITED AVAILABILITY OF HARD CURRENCY FORCED THE CUSTOMER TO OBTAIN THE BOILERS IN EASTERN EUROPE.

C. OUTLOOK: WHILE SEMINAR CONFIRMED VAST EXPORT POTENTIAL FOR U.S. FIRMS, THE COMPETITIVE SITUATION WILL REMAIN DIFFICULT. IN PLANNING THEIR STRATEGY, U.S. FIRMS HAVE ASKED THE EMBASSY FOR COMMERCIAL INTELLIGENCE WHICH WE HAVE NOT YET BEEN ABLE TO DEVELOP. THE VISIT OF AN EXIMBANK TEAM IN MARCH WILL HELP GENERATE ADDITIONAL INFORMATION ON THE STATUS OF MAJOR PROJECTS AND THE BIDDING CONDITIONS. OUR FULL SCHEDULE HOWEVER WILL PREVENT US FROM APPLYING THE CONCENTRATED EFFORT EXPECTED FROM THE U.S. EMBASSY AS THE ONLY RELIABLE INDEPENDENT SOURCE OF COMMERCIAL INFORMATION FOR U.S. FIRMS.

7. CAMPAIGN NO. 2 -FOOD PROCESSING/PACKAGING AND AGRICULTURAL EQUIPMENT

A. RESULTS: ACTIONS 1, 3, 4 AND 10 ON SCHEDULE. ADDITIONAL UNSCHEDULED ACCOMPLISHMENTS INCLUDE MARKET RESEARCH, REPORTING OF 4 TENDERED MAJOR PROJECT OPPORTUNITIES AND DEVELOPMENT OF EARLY WARNINGS ON 3 OTHER MAJOR PROJECTS. ACTION 2 NOT ACCOMPLISHED. ACTIONS 8 AND 9 DELETED WITH THE POSSIBILITY OF RESCHEDULING IN FY 1978 CONTINUATION OF THIS CAMPAIGN. ACTION 5 NOT APPLICABLE.

B. PROGRESS TO DATE ON THIS CAMPAIGN OFFERS EXCELLENT PROSPECTS TO EXPLOIT RAPIDLY DEVELOPING YUGOSLAV SECTOR VIRTUALLY UNKNOWN TO U.S. INDUSTRY. THE COST IN PERSONNEL RESOURCES HAS BEEN FAR HIGHER THAN ANTICIPATED HOWEVER AND ONE OF THE TWO COMMERCIAL OFFICERS HAS HAD TO DEVOTE MOST OF HIS TIME TO THE CAMPAIGN. THE MARKET RESEARCH PROVED EVEN MORE DIFFICULT THAN USUAL BECAUSE IT HAD TO BE PERFORMED BEFORE THE YUGOSLAVS HAD SETTLED ON THEIR PRIORITIES WITHIN THE AGRICULTURAL SECTOR; NOW, AS REFLECTED IN OUR SUPPLEMENTARY REPORTING, THE PRIORITIES ARE BECOMING CLEARER. PROCUREMENT OF U.S. FIRMS
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FOR THE MAY EXHIBIT AT NOVI SAD HAS ALSO BEEN A PROBLEM DESPITE THE INTENSITY AND EFFECTIVENESS OF THE USDOC PROCUREMENT EFFORT, THE EMBASSY HAS HAD TO FOLLOW UP WITH SOME 60 U.S. FIRMS WHICH TOLD USDOC THAT THE DECISION ON PARTICIPATION WOULD BE MADE BY THEIR EUROPEAN SUBSIDIARIES OR AGENTS. DUE TO THE TIME SPENT ON RESEARCH AND PROCUREMENT, IT WAS NECESSARY TO FOREGO ANY ATTEMPT TO PROMOTE FBP TRAVEL.

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C. OUTLOOK: THE ARRIVAL OF A USDOC TEAM IN MID-MARCH WILL PROVIDE URGENTLY NEEDED SUPPORT TO MAINTAIN THE MOMENTUM OF THIS CAMPAIGN. WITH ABOUT 20 FIRMS NOW SIGNED UP, WE HAVE THE MAKINGS OF AN EXCELLENT EXHIBIT. TO INSURE SUCCESSFUL PROMOTION THE COMMERCE TEAM SHOULD ARRIVE WITH INFORMATION NEEDED FOR FLIER AND CATALOGUE. THE PRINT PACKAGE WILL HAVE TO BE OFF THE PRESS BY APRIL 9 TO BE USED IN CONJUNCTION WITH THE SEMINAR PLANNED UNDER ACTION3. THE DEPARTMENT OF LABOR IS DOING AN OUTSTANDING JOB OF PLANNING FOR THIS SEMINAR. TO SUPPORT BOTH THE SEMINAR AND THE EXHIBIT, WE ANTICIPATE THAT AN FSO WILL CONTINUE TO WORK FULL TIME ON THIS CAMPAIGN THROUGH MAY.

8. CAMPAIGN NO. 3 -AVIONICS AND GROUND SUPPORT EQUIPMENT

A. RESULTS: ALL ACTIONS ACCOMPLISHED.

B. THE TECHNICAL SALES SEMINAR IN JANUARY PROVED ANOTHER BRIGHT SPOT IN THE FY 1977 CAMPAIGN. ALL KEY YUGOSLAV DECISION-MAKERS, INCLUDING THE MILITARY, PARTICIPATED. ON THE OPERATIONAL SIDE THE CAMPAIGN HAS DEMONSTRATED THE VALUE OF AN INTEGRATED ECONOMIC/COMMERCIAL SECTION. OVERALL ECONOMIC AND COMMERCIAL RESPONSIBILITIES ARE CLEARLY DELINEATED, BUT CAMPAIGN ACTIVITIES ARE ASSUMED BY THE OFFICER WITH BEST ENTRY INTO THE LOCAL INDUSTRY

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(ALL OFFICERS IN THE SECTION HAVE EXPERIENCE IN COMMERCIAL WORK). IN THIS CASE THE ECONOMIC OFFICER WHO SERVES AS CIVIL AIR ATTACHE NOT ONLY RAN THE SEMINAR BUT HAS UNDERTAKEN THE RESPONSIBILITY FOR FOLLOW UP AND FOR ASSISTANCE TO U.S. AIRCRAFT MANUFACTURES NOW NEGOTIATING THE SALE OF 1 OR 2 WIDE-BODIED JETS TO THE YUGOSLAV AIRLINES.

C. OUTLOOK: WE ANTICIPATE THAT THIS CAMPAIGN WILL KEEP ON SCHEDULE. WE ARE MAINTAINING CONTACTS WITH YUGOSLAV PURCHASERS OF EQUIPMENT AND BEGINNING PROMOTION OF THE PARIS AIR SHOW.

9. CAMPAIGN NO. 4 - MAJOR PROJECT/PRODUCT OPPORTUNITIES

A. RESULTS: ACTION 5 ACCOMPLISHED AND 3 PARTIALLY ACCOMPLISHED. NONE OF THE OTHER 8 ACTIONS ACCOMPLISHED.

B. DUE TO HEAVY INVOLVEMENT IN TRADE PROMOTION EVENTS AND THE CAMPAIGN ON FOOD PROCESSING AND PACKAGING EQUIPMENT, THE MISSION'S ACTIVITY ON MAJOR PROJECTS HAS BECOME LARGELY REACTIVE. THE CONSULATE GENERAL AT ZAGREB HAS PROVIDED CONSIDERABLE ASSISTANCE TO U.S. FIRMS BIDDING PARTS OF THE YUGOSLAV PIPELINE. THE FEW NEW MAJOR PROJECT OPPORTUNITIES DEVELOPED BY THE CONSULATE GENERAL AND THE EMBASSY HAVE COME LARGELY THROUGH CULLING TENDER NOTICES IN THE OFFICIAL GAZETTE. INVESTIGATION OF MANY OF THESE TENDERS HAS ESTABLISHED THAT WE ARE TOO LATE. MEANWHILE THE YUGOSLAVS ARE FIRMING UP SOCIAL ACCORDS IN PRIORITY DEVELOPMENT SECTORS. WE ARE PROVIDING TRANSLATIONS OF THE ACCORDS TO WASHINGTON BUT HAVE BEEN UNABLE TO PERFORM THE TRAVEL NEEDED TO IDENTIFY THE SPECIFIC OPPORTUNITIES IN THE DEVELOPMENT PLANS. NO TIME HAS BEEN AVAILABLE TO DEVELOP OPPORTUNITIES FOR U.S. EXPORTERS ON YUGOSLAV PROJECTS IN THIRD COUNTRIES.

C. OUTLOOK: THE EXIMBANK VISIT WILL UNDOUBTEDLY HELP US UNCOVER A GOOD NUMBER OF PROSPECTIVE MAJOR OPPORTUNITIES FOR U.S. FIRMS. AN ADDITIONAL FSL PROFESSIONAL POSITION RECENTLY GRANTED THE EMBASSY WILL PERMIT INSTITUTION OF A MONITORING SYSTEM AND SOME FOLLOW UP. THERE IS LITTLE POSSIBILITY FOR MUCH MORE THAN REACTIVE TREATMENT OF THIS CAMPAIGN HOWEVER FOR THE BALANCE OF THE FISCAL YEAR.

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10 NON CAMPAIGN INITIATIVES ACTIVITIES

SUPPORT UNITED STATES/YUGOSLAV ECONOMIC COUNCILS (US/YEC):

A. STATUS: OUR REPORTING HAS STRENGTHENED US/YEC INFORMATION SERVICES. MUCH OF US/YEC'S MONTHLY NEWSLETTER CONTAINS ECONOMIC/COMMERCIAL INFORMATION RECEIVED FROM THE EMBASSY AND CONGEN, AND US/YEC HAS BEEN HELPING TO OBTAIN FAIRLY FAST U.S. INDUSTRY REACTION TO MAJOR PROJECTS AND OTHER TRADE OPPORTUNITIES. US/YEC'S COSPONSORSHIP HAS PROVED AN ESSENTIAL INGREDIENT IN OUR TRADE PROMOTION EVENTS. WE FIND

LITTLE ELSE ON THE POSITIOVE SIDE HOWEVER. US/YEC'S YUGOSLAV COUNTERPART, WHICH IS AN APPENDAGE OF THE QUASI-GOVERNMENTAL CHAMBER OF ECONOMY, HAS BEEN DORMANT. THE PRESIDENT (FORMERLY DIRECTOR GENERAL OF JUGOMETAL) HAD DEPT SOME SEMBLANCE OF LIFE IN THE ORGANIZATION BUT HAS BEEN TRANSFERRED. THERE HAS BEEN LACK OF COMMUNICATION BETWEEN US/YEC AND ITS COUNTERPART AT THE WORKING LEVEL AND THE CHAMBER'S COUNSELOR FOR NORTH AMERICAN AFFAIRS, WHO ALSO SERVES AS EXECUTIVE SECRETARY OF THE YUGOSLAV COUNTERPART, HAS RECENTLY BEEN REPLACED BY AN INEXPERIENCED INDIVIDUAL. DUE TO THIS SITUATION ON THE YUGOSLAV SIDE, WE THINK THAT US/YEC HAS BEEN UNABLE EFFECTIVELY TO REPRESENT U.S. FIRMS IN YUGOSLAVIA--AND WE SEE LITTLE EVIDENCE THAT IT IS TRYING VERY HARD. THE FAILURE OF THE CHAMBER OF ECONOMY AND THE YUGOSLAV COUNTERPART TO DEVELOP AN ACTIVE PROGRAM IS PARTIALLY RESPONSIBLE FOR REAWAKENING OFFICIAL YUGOSLAV INTEREST IN CREATION OF A MIXED COMMISSION AT THE GOVERNMENT LEVEL.

B. OUTLOOK: WE THINK THAT US/YEC AND ITS YUGOSLAV COUNTERPART CONTINUE TO HAVE MORE POTENTIAL TO PROMOTE BILATERAL ECONOMIC/COMMERCIAL RELATIONS THAN A MIXED GOVERNMENT COMMISSION. UNLESS US/YEC AND ITS COUNTERPART DEVELOP AN ACTIVE COORDINATED PROGRAM HOWEVER THE TWO ORGANIZATIONS RISK LOSING THEIR REASONS FOR EXISTENCE AND ANY CLAIM FOR JUSTIFICATION OF EMBASSY SUPPORT. WE ARE PREPARED TO CONSULT AND HELP US/YEC'S PRESIDENT AND EXECUTIVE SECRETARY WHEN THEY VISIT YUGOSLAVIA IN MARCH TO PERFORM ADVANCE WORK
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FOR THE JOINT MEETING OF THE TWO ORGANIZATIONS IN JUNE. WE ALSO ANTICIPATE THE NEED TO PROVIDE CONSIDERABLE ADMINISTRATIVE SUPPORT FOR THE MEETING GIVEN THE INEXPERIENCE OF THE YUGOSLAV COUNTERPART EXECUTIVE SECRETARY.

11. PROMOTION OF CONSUMER GOODS:

A. STATUS: THE SHIFT IN THEME FOR THE 1977 ZAGREB FALL FAIR HAS REDUCED THE SCOPE OF THE CAMPAIGN ON ENERGY SYSTEMS BUT ALSO CREATED AN OPPORTUNITY TO TEST THE MARKET FOR CONSUMER GOODS. SINCE THE PLAN INCLUDES LOCAL PROCUREMENT OF U.S. EXHIBITORS. THE CONSULATE GENERAL HAS HAD TO REPROGRAM FSO TIME AWAY FROM CAMPAIGN ACTIVITIES. WE ANTICIPATE THAT WORK ON THE FAIR WILL OCCUPY ONE FSO AND ONE FSL IN ZAGREB ALMOST FULL TIME DURING THE PROCUREMENT PERIOD THROUGH MID-MAY.

12. EXPORT OPPORTUNITIES FOR PLASTICS, TECHNOLOGY AND MACHINERY TO PERMIT A TECHNICAL SALES SEMINAR ON THIS THEME IN EARLY FY 78, THE EMBASSY HAS UNDERTAKEN AN UNSCHEDULED MARKET RESEARCH EFFORT. ALTHOUGH WE WILL NOT BE ABLE TO COMPLETE A COMPREHENSIVE RESEARCH PROJECT, WE DO ANTICIPATE PROVIDING SUFFICIENT MARKETING INFORMATION BY THE COMMERCE DEADLINE OF MARCH 16 FOR COMMERCE TO RECRUIT U.S. INDUSTRY PARTICIPANTS FOR THIS SEMINAR.

13. CONCLUSIONS AND RECOMMENDATIONS: ALTHOUGH THIS REVIEW SHOWS ENCOURAGING PROGRESS TOWARD REALIZATION OF CCP GOALS, ALL TOO MANY MAJOR OBJECTIVES HAVE HAD TO BE SACRIFICED. WE HAVE ABSOLUTELY NO FLEXIBILITY TO HANDLE TARGETS OF OPPORTUNITY OR UNEXPECTED REPORTING REQUESTS. THEREFORE, WE WOULD URGE THE DEPARTMENT IN LEVYING ANY NEW DEMANDS ALSO TO RECOMMEND WHICH OF OUR EXISTING COMMITMENTS WE ARE TO FOREGO. WE WOULD ALSO AGAIN URGE THE DEPARTMENT TO GIVE ATTENTION TO OUR PERSONNEL SITUATION.
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